Pre-Qualified Consultant Services Information Booklet 2003-06

Consulting
Training
Facilitating
Speaking

State Training Center (STC)
Department of Personnel Administration
1515 "S" Street, North Building, Suite 108
Sacramento, CA 95814-7243
Phone: (916) 445-5121 FAX (916) 322-4755
E-Mail: consultants@dpa.ca.gov
www.dpa.ca.gov

Table of Contents

Attachments

Blank Pre-Qualified Consultant Services Forms:

Sample Contract Forms:

Why use Pre-Qualified Consultant Services?

The Pre-Qualified Consultant Services Program (formerly titled Office of Statewide Continuous Improvement) maintains a pool of qualified consultants, trainers, facilitators, and speakers to provide services for State agencies. This pool not only saves individual departments time and money, it also results in less duplication of effort within the State. The following outlines some of the benefits, limitations and requirements of the program:

Benefits:

- You <u>do not</u> have to do your own Request for Proposal (RFP).
- The State Training Center (STC) will provide you with a minimum of seven consultants for review from our Pre-Qualified Bidders' List that match your needs.
- The STC prepares the Three-Party Agreement between the STC, Client Agency, and Contractor.
- As a courtesy service, the DPA prepares the Contract Award Report (STD. 16) and sends it to the Client Agency for submission to the Department of Fair Employment and Housing, Office of Compliance Program.

Limitations:

- Each project cannot exceed the contract amount of $100,000. This amount does not include the 10 percent STC Administrative Service Charge. This process is not intended to take the place of a RFP for large, complex or long-term consultant projects. For more than one project that requires different topics/consultants, a contract would be written for each project. For each consultant that you wish to have deliver services, you must have a separate Three-Party Agreement.

Requirements:

- The DPA has the principal responsibility of the contract process, and as the contract holder, is responsible for contract approval. For those Client Agencies who may have exemptions from Department of General Services approval, these exemptions do not apply for these contracts.
- All Bidders placed on the Pre-Qualified Bidders' List have agreed to all standard State contract requirements and understand that this agreement will become part of any contract awarded as a result of this process.
- After the Three-Party Agreement is signed by all parties and the work initiated, the Client Agency pays the consultant directly for the services the consultant provides.

Do I Need a Consultant?

Important areas to consider in determining if you need a consultant:

- Have you defined the problem?
- Have you discussed the problem with your Training Officer?
- Does this problem require a special skill or expertise to resolve?
- Can someone in your Department help you?
- Does this problem need to be resolved by someone from outside your Department (e.g., sensitivity issues, too close to the problem, etc.)?
- Can a State employee from another Department help you?

If, after answering these questions, you believe that you need a consultant, call us at **(916) 445-1521** and ask for our Pre-Qualified Consultant Services Program representative. We can help you define the needs of your department. If you require more information regarding the Pre-Qualified Consultant Services process and requirements please go to **www.dpa.ca.gov**.

Definitions of Services

Consulting

A professional consultant, individual or firm, with special knowledge, skills and talents who renders advice and assists others in successfully implementing that advice. A consultant may be a subject matter expert, but if not, usually has considerable knowledge of group dynamics that is important in assisting the client reach their goal.

Training

Activities that are designed to help an individual become proficient in the current assignment or prepare for a future assignment. Such activities may be accomplished through self-study, small-group learning and classroom sessions. On-the-job training, as opposed to education, is usually thought of in the context of short-term, intense learning activity resulting in immediate application on the job.

Facilitating

This role may include identifying techniques for leading discussions and building consensus, evaluating team dynamics/team climate, resolving conflicts, identifying appropriate actions in each step of the problem-solving process improvement cycle, or assisting the team leader as needed.

Speaking

Services offered include keynote speaking, supporting the objectives of a meeting, motivational speeches, or customizing a speech to fit the customer needs.

Definitions of Consultant Topics

Customer Service

Assist an agency in developing its customer service competency, which may include handling special problems and sensitive issues with customers, such as defusing anger, and/or dealing with upset customers. Provide packaged or customized surveys for organizations to use in measuring customer satisfaction and/or performance levels.

Facilitators

Act as a facilitator with a group or team. This may include using techniques for leading discussions, building consensus, evaluating team dynamics, resolving conflicts, generating options and alternatives, and/or problem solving. The facilitator may assist a team leader or chairperson.

Leadership

Provide consultation on developing interpersonal and leadership skills in support of strategic management and visionary motivation. Discuss the behaviors that support effective delegation, empowerment, creativity, accountability, and responsibility.

Process Improvement

Explain the process improvement methods and tools, and assist staff in applying methods or tools to work processes.

Strategic/Operational Planning

Assist the organization in its planning process, including change management. Steps may include establishing vision, mission, and values; identifying strengths and weaknesses, opportunities and threats; identifying customer needs, critical processes, identifying organizational objectives; creating a tracking and review process.

Speaker

Services offered are, but not limited to, keynote speaking, supporting the objectives of a meeting, motivational speeches, or customizing a speech to fit the customer needs.

Team Building

Assist employees in developing the interpersonal skills needed to work effectively in team or work groups. This may include communication principles, group problem-solving models, meeting management skills, stress management, or dealing with conflict.

Team Work

Explain the role, function and interaction of team members, leaders, sponsors, and/or facilitators which may include assisting team members in the application of the principles, techniques and processes of project management.

Steps for Using the Pre-Qualified Bidders' List

1. Client Agency determines need and develops general outline of work

2. Client Agency contacts STC for referral of Bidders

3. STC and Client Agency determine applicable service and topic
See pages 3-4

4. Client Agency develops specific desired outcomes
Work Statement "A"
See pages 7-8

5. STC selects and refers seven (7) Bidders to Client Agency

6. Client Agency provides Bidders the general outline of work and specific desired outcomes
Work Statement "A"
See page 8

7. All referred Bidders provide proposals to Client Agency

8. Client Agency reviews proposals and scores Bidders using **Rating/Cost Proposal Worksheets**
See pages 10-12

9. Client Agency selects highest scoring Bidder

10. Client Agency and selected Bidder finalize agreement
Work Statement "B"
See pages 13-14

11. Client Agency provides STC with **Work Statement "B", Funding Strip/Signature Block and Rating/Cost Proposal Worksheets** - *See pages 10-14 and 21*

12. STC prepares and distributes signed Three-Party Agreement STD. 213
See page 24

13. Consultant begins work upon agreement approval

14. Upon project completion, Client Agency completes the STD. 4 to evaluate consultant performance
See Page 22

Steps for Using the Pre-Qualified Bidders' List

1. Client Agency determines need and defines general outline of work including time frames and approximate project budget.

2. Client Agency contacts STC for referral of Bidders.

3. STC and Client Agency determine applicable service and topic. *- see pages 3-4*

4. Client Agency develops specific desired outcomes (Work Statement "A"). *- see pages 7-8*

5. STC selects seven (7) Bidders based upon Client Agency criteria from the Pre-Qualified Bidders' List to refer to the Client Agency (additional Bidders will be referred if original referrals do not meet Client Agency needs).

6. Client Agency shall provide the Bidders with a general outline of work along with the detailed specific outcomes (Work Statement "A"). *- see page 8*

7. All referred Bidders will provide the Client Agency a proposal, including a description of project phases (specific work items/deliverables/outcomes), a progress schedule, and a cost breakdown.

8. Client Agency reviews the Bidders' proposals; conducts interviews if needed; and scores Bidders on experience, education, cost (including small business preference), and Bidder's proposed approach to the scope of work. For each Bidder a score of 100 points is possible. A weight of no less than 30 points must be given to the cost component. For example of how to score Bidders, see Rating/Cost Proposal Worksheets. *- see pages 10-12*

9. Client Agency selects the Bidder with the highest score (Client Agency has the reserved right to reject all proposals).

10. Client Agency and selected Bidder (Contractor) finalize the detailed work statement (Work Statement "B"), including the description of project phases, the progress schedule, and the cost breakdown. The maximum hourly rate that the Contractor can charge to the Client Agency will be the RFQ hourly rate. During the referral and selection phase, the Contractor may elect to charge a lesser rate when submitting their project cost proposal to the Client Agency. The Contractor's project cost proposal may include travel and per diem expenses, materials and all other cost items (e.g. copying) for which the Contractor seeks payment or reimbursement. *- see pages 13-14*

11. Client Agency provides Work Statement "B", the Rating/Cost Proposal Worksheets and Funding Strip/ Signature Block Information to the STC. *- see pages 10-14, and 21.*

12. STC prepares the Three-Party Agreement (Standard Agreement STD. 213) between STC, Client Agency, and selected Contractor, which includes the scope of work described in item 10 above. The STC distributes signed contract copies. *- see page 24*

13. Following execution of the contract, and approval of the contract by the Department of General Services or DPA, as required, Contractor begins project for Client Agency.

14. Upon completion of the project, Client Agency evaluates Contractor's performance utilizing the Contract/Contractor Evaluation (STD. 4). *- see page 22*

WORK STATEMENT "A"
(Initial Outline of Issues and Needs)

This work statement outlines an accurate and thorough description of the issues and services needed. This will ensure that your department will receive the services you want.

The following page provides an example of what to consider when completing Work Statement "A" (Facilitation Services example). This form can be modified to meet your specific needs.

Work Statement "A"
(Initial Outline of Issues and Needs)

Facilitation Example

Project Description (Problem Statement): The ABC Department requires consultant/facilitation services to assist in its examination of issues surrounding the establishment of new gasoline octane ratings procedures for California as a result of new federal guidelines. The Department will serve as a committee member due to our regulatory oversight in this area. Participants in this project will include representatives from the Administration, oil refining industry, gasoline providers association, consumer and environmental advocacy groups and Legislature. The specific issues under examination are as follows:

1. Impact on oil refining producers
2. Impact on gasoline vendors
3. Impact on consumers
4. Impact on the environment
5. Impact on State control
6. Impact on legislation

Project Outcomes

- Understanding the impact of all involved in carrying this project forward;
- Ensuring that all involved participants are represented and their input voiced; and
- Capturing all relevant information for inclusion in a future report

Proposed Work Plan:

The Department will contract for the services of a consultant/facilitator for the completion of this project. The Department is requesting meeting design and documentation services as well. In order to adequately provide enough time to discuss/research the issues and develop recommendations, approximately one full day and two half-day meetings will occur, with each meeting occurring two to four weeks apart from each other. Meetings will take place in the Department's headquarters in Sacramento. The consultant/facilitator will work with the committee members with the assistance from the Department staff to complete final recommendations to the members regarding the issues specified above.

THE FACILITATOR WILL PROVIDE THE FOLLOWING SERVICES:

- Meeting design and agenda planning services.
- Meeting facilitation using a variety of facilitation methods and techniques to enhance the productivity of the discussion.
- Preparation of meeting notes to properly document meeting discussions.
- All services include the use of electronic meeting equipment that includes 20 laptops, host server and local area network.
- Preparation of final meeting report at the conclusion of the meeting in a format acceptable to the department.

Contract Parameters:

* Duration: Approximately 57 hours
* Commencement/Completion Date: Approximately October-December 2003
* Destination: Department Headquarters, Sacramento, CA
* Travel Expenses: None
* Facilitation Materials Cost: $800
* Facilitation Services Cost: $8,550

Project Coordinator:	Contracts Coordinator:
Section/Unit:	Section/Unit:
Address:	Address:
Phone:	Fax:
E-Mail:	E-Mail:

Rating and Cost Proposal Worksheets

The Client Agency reviews proposals; conducts interviews; checks references if needed; and scores referred Bidders on experience, education, cost (including small business preference), and consultant's proposed approach to the scope of work. For each Bidder a score of 100 points is possible. A weight of no less than 30 points must be given to the cost component.

The following three pages provides an example of how the Rating/Cost Proposal Worksheet should be completed.

RATING WORKSHEET

Example

Department Name: ABC

Evaluator: John Smith Phone #: 123-4567

Project Topic

Customer Service	☐	Facilitators	☐	Leadership	☐
Process Improvement	☒	Strategic/Operational Planning	☐	Speaker	☐
Team Building	☐	Team Work	☐		

Step 1. Evaluate and score the bidders on the criteria listed below. Each criteria can have a maximum of the points listed. Use the Cost Proposal Worksheet to calculate the Cost Proposal scores in Box D.

		Bidder #1	Bidder #2	Bidder #3
	Bidding Company (Check box if company is a Small Business)	Company ABC ☐	Company DEF ☐	Company GHI ☐
	Consultant Name	Tom	Jane	Harry
BOX A	**Proposal Evaluation** (max 25 points)	15	20	25
BOX B	**Education** (max 20 points)	15	20	20
BOX C	**Experience** (max 25 points)	20	20	25
BOX D (See Cost Proposal Worksheet)	**Cost Proposal** (Lowest cost receives 30 pts.)	\$80.00 | Score: 22.5	\$60.00 | Score: 30	\$65.00 | Score: 27.6
BOX E	**Total** (Place the sum of Boxes A, B, C, and D for each company in these spaces.)	72.5	90	97.6

Step 2. Are any bidders Certified Small Businesses? **If "yes", go to Step 3; If "no", STOP HERE.**

Step 3. Place the highest scoring bidder's cost proposal amount from Box E into Box F below.

BOX F

Highest Scoring Bid	Bidder	Hourly Rate
97.6	#3	\$ 65.00

Step 4. Is the highest scoring bidder a Certified Small Business? **If "yes", STOP HERE; If "no", go to Step 5.**

RATING WORKSHEET - *continued*

Example

Step 5. **To calculate the Small Business Preference Amount**, multiply the hourly rate bid from Box F by 5% and place the answer into Box G:

BOX G

Dollar amount from Box F : $ 65.00 X 5% = **$3.25**

Step 6. Transfer the cost proposal and score from Box D to Box H below.

BOX H

Bidder #1	Bidder #2	Bidder #3
Cost: $80.00 Score: 22.5	Cost: $60.00 Score: 30	Cost $65.00 Score: 27.6

Step 7. Subtract the Small Business Preference amount in Box G from the cost proposal component in Box H, for the bidders **who are** Certified Small Businesses.

BOX I

	Bidder #1	Bidder #2	Bidder #3
Cost Proposal for Certified Small Businesses only:	$80.00	______	______
Amount from Box G:	- 3.25	– ______	– ______
Certified Small Business adjusted cost:	$76.75	______	______

Step 8. Using Step 2 and 3 of the Cost Proposal Worksheet, recalculate the point factor for those Bidders **who are** a Certified Small Business. Place the answer in the appropriate Bidders box in Box J.

Step 9. Score each bidder's adjusted cost proposal amount in Box I (only Certified Small Business scores get adjusted). Place the scored results in Box J. If the cost proposal amount is not adjusted, place bidder's scores from Box D or H.

BOX J

Bidder #1	Bidder #2	Bidder #3
23.4	30	27.6

Step 10. Total the scores from Boxes A, B, C, and J for each bidder and place the total scores in Box K below. **The contract is awarded to the bidder with the highest final score.**

BOX K

Bidder #1	Bidder #2	Bidder #3
73.4	90	97.6

Cost Proposal Worksheet

Example

The following is the formula to award points to cost proposals:

$$\frac{\text{Low Bid Amount}}{\text{Bid price being evaluated}} \times 30 = \text{Points given to cost proposal (hourly rate) being evaluated}$$

Here is how you do it:

Step 1 Transfer bidders hourly rates to the below boxes. Award 30 points to the lowest hourly rate:

Box D

	Bidder #1		Bidder #2		Bidder #3	
Cost Proposal (lowest cost receives 30 points)	Hourly Rate:	Score/Points:	Hourly Rate:	Score/Points: 30	Hourly Rate:	Score/points:
	$80.00		$60.00	30	$65.00	

Step 2 Divide lowest hourly rate by each of the remaining bidders rates to get the point factor:

Lowest Hourly Rate		Bidder #1 Hourly Rate		Point Factor
$60.00	÷	$80.00	=	.75

Lowest Hourly Rate		Bidder #3 Hourly Rate		Point Factor
$60.00	÷	$65.00	=	= .92

Step 3 Multiply each resulting point factor by 30:

Point Factor for Bidder #1			
.75	X 30 =	22.5	

Point Factor for Bidder #3		
.92	X 30 =	27.5

Step 4 Award the points to bidders from your outcome of Step 3 above.

Box D

	Bidder #1		Bidder #2		Bidder #3	
Cost Proposal (lowest cost receives 30 points)	Hourly Rate:	Score/Points:	Hourly Rate:	Score/Points: 30	Hourly Rate:	Score/points:
	$80.00	22.5	$60.00	30	$65.00	27.6

Transfer your scores/points results to "Box D" on the Rating Worksheet.

WORK STATEMENT "B"
(Agreed Upon Work Statement)

This work statement outlines an accurate and thorough description of the services that will be provided, deliverables, time frames, and cost. This will ensure that your department receives the services negotiated with the chosen consultant.

The following page provides an example of how Work Statement "B" should be completed for a request for "Consulting/Strategic Planning" services. This form can be modified to meet your specific needs.

Remember that the Work Statement must specifically contain:

- A clear description of the problem;
- Identify in realistic terms what the consultant is to accomplish, including desired approach to the problem;
- Practical, policy, technological, and legal limitations;
- Specific questions to be answered;
- The manner in which the work is to be done;
- A description of the items to be delivered;
- And the extent and nature of the assistance and cooperation that will be available to the consultant from the State.

WORK STATEMENT "B"
(Describes deliverables, time frames and cost)

Consulting Example

Department: XYZ
Consultant: Carl Consultant
Contract # **

Project Description:

The XYZ Division needs a Strategic Plan with performance measures. The Plan will detail the objectives for each unit within the Division and indicate the appropriate measurements of success. The consultant will facilitate the Division offsite meetings and provide training and consultation, as needed throughout the process. The consultant will work with Division staff in the completion of each of the following phases:

Phase	Period of Completion	Cost
Phase I - Facilitate Division meetings to achieve the following: • Overview of Strategic Planning Process • Develop planning criteria • Define customers • Draft Mission Statement • Identify strengths and weaknesses • Identify opportunities and threats	July - September 2003	120 hrs X $125/hr = $15,000 Travel 525 Materials 735 Total $16,260
Phase II - Work with planning teams to complete the following: • Obtain input from customers, line supervisors and staff • Identify specific trends, goals and objectives • Develop strategies to meet objectives through teams • Train teams to fulfill role	October - December 2003	80 hrs X 125/hr = $10,000 Travel 325 Materials 200 Total $10,525
Phase III - Finalize the Plan by completing the following: • Teams present objectives and strategies to Division • Work with teams to finalize after reviewing feedback • Develop a plan to obtain baseline customer data • Develop strategy to communicate the Plan • Create a final report	January - February 2004	100 hrs X $125/hr = $12,500 Travel 450 Materials 520 Total $13,470
**** STC will provide DPA Contract Number**	**TOTAL**	**$40,255**

Clauses Specific to the State Training Center (STC) and Client Agency

EXHIBIT D, SPECIAL TERMS AND CONDITIONS

A. Term of Contract

The contract becomes effective on the date the contract is approved by the Department of Personnel Administration and the Client Agency, or the Department of General Services, whichever date is later. The contract may be amended only by mutual written consent of all parties. The term of the contract may be extended up to one year, if necessary, for the completion of a project. The STC has no obligation concerning unused days or fund balances upon expiration of the contract.

B. Materials

Materials will be addressed in the work statement/specific scope of work and proposals by the bidder.

C. Evaluation of Performance

The contractor's performance shall be evaluated in accordance with Public Contract Code sections 10367, 10369, and 10370. The Client Agency shall evaluate the Contractor utilizing the Contract/Contractor Evaluation (STD. 4) process. A copy of the evaluation will be sent to the Department of General Services, Office of Legal Services, if it is negative and over $5,000.

D. Potential Subcontractors

Nothing contained in this Agreement or otherwise, shall create any contractual relation between the State and any subcontractors, and no subcontract shall relieve the Contractor of his responsibilities and obligations hereunder. The Contractor agrees to be as fully responsible to the State for the acts and omissions of its subcontractors and of persons either directly or indirectly employed by any of them as it is for the acts and omissions of persons directly employed by the Contractor. The Contractor's obligation to pay its subcontractors is an independent obligation from the State's obligation to make payments to the Contractor. As a result, the State shall have no obligation to pay or to enforce the payment of any moneys to any subcontractor.

E. Additional Consultants

The STC retains the right of approval over any person serving as a consultant under this agreement. Consultants cannot be substituted without the consent of the STC and the Client Agency.

F. Scope and Delivery of Services

The Contractor agrees to provide consulting/training services in accordance with the work statement. The work statement shall describe the specific services to be rendered, the applicable time frames (completion dates, report dates, etc.) and an estimate/cost breakdown (hourly rates, etc.) for all deliverables.

WORK STATEMENT "A"
(Initial Outline of Issues and Needs)

Project Description (Problem Statement)

Project Outcomes

Proposed Work Plan:

Contractor Requirements:

Contract Parameters:

Project Coordinator:	Contracts Coordinator:
Section/Unit:	Section/Unit:
Address:	Address:
Phone:	Fax:
E-Mail:	E-Mail:

WORK STATEMENT "B"
(Describes deliverables, time frames and cost)

Department:

Consultant:

Contract # **

Project Description:

Project Breakdown **(Phases, Segments, Stages, etc.)**	**Period of Completion** (should be month or date specific depending upon project)	**Cost** Hours x rate/hr = Travel <u>Materials</u> Total
Use more as needed		Hours x rate/hr = Travel <u>Materials</u> Total **TOTAL**

** **STC will provide DPA Contract Number**

Attachment III

RATING WORKSHEET

Example

Department Name: ____________________

Evaluator: _________________ **Phone #:** _________________

Project Topic

Customer Service	☐	Facilitators	☐	Leadership	☐
Process Improvement	☐	Strategic/Operational Planning	☐	Speaker	☐
Team Building	☐	Team Work	☐		

Step 1. Evaluate and score the bidders on the criteria listed below. Each criteria can have a maximum of the points listed. Use the Cost Proposal Worksheet to calculate the Cost Proposal scores in Box D.

		Bidder #1	Bidder #2	Bidder #3
	Bidding Company (Check box if company is a Small Business)	☐	☐	☐
	Consultant Name			
BOX A	**Proposal Evaluation** (max 25 points)			
BOX B	**Education** (max 20 points)			
BOX C	**Experience** (max 25 points)			
BOX D **(See Cost Proposal Worksheet)**	**Cost Proposal** **(Lowest cost receives 30 pts.)**	Score:	Score:	Score:
BOX E	**Total** (Place the sum of Boxes A, B, C, and D for each company in these spaces.)			

Step 2. Are any bidders Certified Small Businesses? **If "yes", go to Step 3; If "no", STOP HERE.**

Step 3. Place the highest scoring bidder's cost proposal amount from Box E into Box F below.

BOX F

Highest Scoring Bid	Bidder	Hourly Rate

Step 4. Is the highest scoring bidder a Certified Small Business? **If "yes", STOP HERE; If "no", go to Step 5.**

RATING WORKSHEET - *continued*

Step 5. **To calculate the Small Business Preference Amount**, multiply the hourly rate bid from Box F by 5% and place the answer into Box G:

BOX G

Dollar amount from Box F : $______ X 5% = ______

Step 6. Transfer the cost proposal and score from Box D to Box H below.

BOX H

Bidder #1	Bidder #2	Bidder #3
Cost: ________ Score: ________	Cost: _______ Score: _______	Cost: _______ Score: _______

Step 7. Subtract the Small Business Preference amount in Box G from the cost proposal component in Box H, for the bidders **who are** Certified Small Businesses.

BOX I

	Bidder #1	Bidder #2	Bidder #3
Cost Proposal for Certified Small Businesses only:	________	________	________
Amount from Box G:	– ________	– ________	– ________
Certified Small Business adjusted cost:	________	________	________

Step 8. Using Step 2 and 3 of the Cost Proposal Worksheet, recalculate the point factor for those Bidders **who are** a Certified Small Business. Place the answer in the appropriate Bidders box in Box J.

Step 9. Score each bidder's adjusted cost proposal amount in Box I (only Certified Small Business scores get adjusted). Place the scored results in Box J. If the cost proposal amount is not adjusted, place bidder's scores from Box D or H.

BOX J

Bidder #1	Bidder #2	Bidder #3
______	_______	_______

Step 10. Total the scores from Boxes A, B, C, and J for each bidder and place the total scores in Box K below. **The contract is awarded to the bidder with the highest final score.**

BOX K

Bidder #1	Bidder #2	Bidder #3
______	______	______

Cost Proposal Worksheet

Example

The following is the formula to award points to cost proposals:

$$\frac{\text{Low Bid Amount}}{\text{Bid price being evaluated}} \times 30 = \text{Points given to cost proposal (hourly rate) being evaluated}$$

Here is how you do it:

Step 1 Transfer bidders hourly rates to the boxes below. Award 30 points to the lowest hourly rate:

Box D

	Bidder #1		Bidder #2		Bidder #3	
Cost Proposal (lowest cost receives 30 points)	Hourly Rate: ________	Score/Points: ________	Hourly Rate: ________	Score/Points: 30 ________	Hourly Rate: ________	Score/points: ________

Step 2 Divide lowest hourly rate by each of the remaining bidders rates to get the point factor:

Lowest Hourly Rate		Bidder's Rate Being Evaluated		Point Factor
	÷		=	

Lowest Hourly Rate		Bidder's Rate Being Evaluated		Point Factor
	÷		=	

Step 3 Multiply each resulting point factor by 30:

Point Factor				Point Factor		
	X 30 =				X 30 =	

Step 4 Award the points to bidders from your outcome of Step 3 above.

Box D

	Bidder #1		Bidder #2		Bidder #3	
Cost Proposal (lowest cost receives 30 points)	Hourly Rate: ________	Score/Points: ________	Hourly Rate: ________	Score/Points: ________	Hourly Rate: ________	Score/points: ________

Transfer your scores/points results to "Box D" on the Rating Worksheet.

FUNDING STRIP AND SIGNATURE BLOCK INFORMATION
Pre-Qualified Consultant Services Three-Party Agreement

Please provide the funding strip and signature block information below for our office to create the contract. Return this information along with "Work Statement B" and the "Rating/Cost Proposal Worksheets" to the STC. You may fax this information to (916) 322-4755, Attention: PQCS Coordinator. For further assistance, please call (916) 445-5121.

Agency # (Your department's internal reference contract number):
STC Customer #
Name of authorized signatory for your department:
Title of authorized signatory for your department:
Program/Category (code and title):
Fund Title:
Box for optional use:
Item:
Chapter:
Statute:
Fiscal Year (if other than current fiscal year):
Object of expenditure (code and title):
Please provide your Department Accounting Unit information below. This information will be used to ensure proper billing within your department.
Department:
Attention:
Address:
Phone Number:
E-mail Address:

Thank you!

STD. 4 (REV. 5/2002)

STATE OF CALIFORNIA – DEPARTMENT OF GENERAL SERVICES

CONTRACT/CONTRACTOR EVALUATION

OFFICE OF LEGAL SERVICES

This evaluation must be completed for all consulting services contracts $5,000 and over within 60 days of completion of the contract. If performance by the contractor was unsatisfactory, a copy of the evaluation must be sent to the Department of General Services, Office of Legal Services, 707 Third Street, Suite 7-330, 7th Floor, West Sacramento, CA 95605 within five days after completion of the evaluation. The contractor must be notified and sent a copy of the unsatisfactory evaluation within fifteen days after its completion.

CONTRACT NUMBER	AM. NO.

DEPARTMENT	CONTRACTOR'S NAME AND ADDRESS
DIVISION	
EVALUATOR'S NAME	

TAXPAYER'S FEDERAL EMPLOYER IDENTIFICATION NUMBER	CONTRACT COMMENCEMENT DATE	CONTRACT EXPIRATION DATE

1. TOTAL CONTRACT AMOUNT, INCLUDING AMENDMENTS

2. DESCRIBE SERVICE OR PRODUCT TO BE PROVIDED UNDER CONTRACT

3. IS THE SERVICE / PRODUCT BEING UTILIZED?

☐ NO - If no, explain why

☐ YES - If yes, explain how the product or service met the specific problem, administrative requirement, or program need which made the contract necessary.

4. DID THE CONTRACTOR FULFILL ALL REQUIREMENTS OF CONTRACT INCLUDING QUALITY STANDARDS?

☐ NO - If NO, explain

☐ YES

5. IF ANSWER TO ITEM 4 WAS NO, WAS CONTRACTOR NOTIFIED AND SENT A COPY OF THE EVALUATION?		6. TYPE OF BIDDING
☐ YES ☐ NO		☐ RFP/IFB ☐ SOLE SOURCE
7. EMPLOYEE TO BE CONTACTED REGARDING CONTRACTOR PERFORMANCE	8. TITLE	9. TELEPHONE NUMBER

10. EVALUATOR'S SIGNATURE	11. TITLE	12. DATE	13. TELEPHONE NUMBER

This standard State form is available in E-format at http://www.documents.dgs.ca.gov/osp/pdf/std004.pdf

STATE OF CALIFORNIA

CONTRACT AWARD REPORT

STD. 16 (REV 11-92)

TITLE 2, DIVISION 4, CHAPTER 5, SECTION 8117.5 OF THE CALIFORNIA CODE OF REGULATIONS REQUIRES CONTRACT AWARDING AGENCIES TO NOTIFY THE DEPARTMENT OF FAIR EMPLOYMENT AND HOUSING, OFFICE OF COMPLIANCE PROGRAMS OF ANY CONTRACT AWARD IN EXCESS OF $5,000. SUBMIT ONE COMPLETED COPY OF THIS FORM TO THE OFFICE OF COMPLIANCE PROGRAMS FOR EACH CONTRACT IN EXCESS OF $5,000 WITHIN 10 DAYS OF AWARD DATE.

SHADED AREAS FOR OFFICE OF COMPLIANCE PROGRAMS USE ONLY

CONTRACTOR INFORMATION

CONTRACTOR'S NAME	TELEPHONE NUMBER AREA CODE ( )
ADDRESS (NUMBER STREET CITY STATE ZIP CODE)	
FEDERAL EMPLOYER I.D. NUMBER	COMPANY OFFICER AND TITLE

CONTRACT INFORMATION

CONTRACT AMOUNT .00	STATE CONTRACT NUMBER	CONTRACT AWARD DATE
PROJECT LOCATION (COUNTY)		COUNTY CODE
ESTIMATED PROJECT STARTING DATE: MONTH DAY YEAR	ESTIMATED PROJECT COMPLETION DATE: MONTH DAY YEAR	

TYPE OF CONTRACT

☐ CONSTRUCTION ☐ SERVICE ☐ SUPPLIES AND COMMODITIES

IS THIS PROJECT FEDERALLY FUNDED?

☐ YES ☐ NO

AWARDING AGENCY INFORMATION

AGENCY NAME	AGENCY ADDRESS	AGENCY CODE
SIGNATURE OF PERSON COMPLETING FORM	PRINTED NAME AND TITLE	TELEPHONE NUMBER

This standard State form is available in E-format at "http://www.documents.dgs.ca.gov/osp/pdf/std016.pdf"

STATE OF CALIFORNIA
STANDARD AGREEMENT
STD 213 (Rev 06/03)

AGREEMENT NUMBER
REGISTRATION NUMBER

1. This Agreement is entered into between the State Agency and the Contractor named below:

STATE AGENCY'S NAME

CONTRACTOR'S NAME

2. The term of this Agreement is: through

3. The maximum amount of this Agreement is: $

4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

Exhibit A – Scope of Work	page(s)
Exhibit B – Budget Detail and Payment Provisions	page(s)
Exhibit C* – General Terms and Conditions	
Check mark one item below as Exhibit D:	
☐ Exhibit - D Special Terms and Conditions (Attached hereto as part of this agreement)	page(s)
☐ Exhibit - D* Special Terms and Conditions	
Exhibit E – Additional Provisions	page(s)

Items shown with an Asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at www.ols.dgs.ca.gov/Standard+Language

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR		***California Department of General Services Use Only***
CONTRACTOR'S NAME *(if other than an individual, state whether a corporation, partnership, etc.)*		
BY *(Authorized Signature)* ✍	DATE SIGNED *(Do not type)*	
PRINTED NAME AND TITLE OF PERSON SIGNING		
ADDRESS		
STATE OF CALIFORNIA		
AGENCY NAME		
BY *(Authorized Signature)* ✍	DATE SIGNED *(Do not type)*	
PRINTED NAME AND TITLE OF PERSON SIGNING		☐ Exempt per:
ADDRESS		

This standard State form is available in E-format at "http://www.documents.dgs.ca.gov/ols/CONTRACTING%20INFO/STD213-JUNE%2003.doc"

State Training Center
Department of Personnel Administration
1515 "S" Street, North Building, Suite 108
Sacramento, CA 95814-7243
(916) 445-5121 Fax: (916) 324-4050

www.dpa.ca.gov

Revised 8/03